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MARKET ACCESS SECRETARIAT
Global Analysis Report

Commodity Innovation Series

NEW PRODUCTS CONTAINING WHEAT

FEBRUARY 2017

EXECUTIVE SUMMARY

For the purpose of this report, wheat is referring to the following wheat types: durum wheat, durum wheat semolina, hard red spring and hard red winter wheat.

Globally there were 22, 433 products containing wheat introduced between January 2010 to October 2016, with 22,410 launched in food, 22 in pet food and 1 in drinks.

During the evaluation period, the use of wheat has been on a rise, with the most product launches (4,841) occurring in 2015. Durum wheat semolina saw the most product launches, followed by durum wheat. Globally, the Europe region launched the most products with a total 15,502, followed by Asia Pacific (2,047), and Latin America (1,966).

Lidl, Barilla, and Marks & Spencer are the top companies in the world to launch the most products containing wheat. Lidl launched 740 products, followed by Barilla with 705, and Marks & Spencer with 308.

Of the ingredient origins identified, Italy, Turkey, and Japan were the top countries to provide wheat for product launches. However, Canada was ranked 16th in supplying wheat, specifically durum wheat and durum wheat semolina.

CONTENTS

Executive Summary 1
Introduction 2
Regions 2
Product Categories 3
Company and Brand 4
Ingredient Origin 5
Product Claims 6
Markets of Interest 7
New Product Examples 8
For More Information 13
Resources 13

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INTRODUCTION

According to Mintel, from January 2010 to October 2016, there were 22, 433 product launches containing durum wheat, durum wheat semolina, hard red spring and hard red winter wheat in the world. Of the total products launched 75.9% of them were new, while 24.1% were re-launches due to new packaging and new formulation.

In figure 1, you can see there is a growing use of wheat in product launches around the world. The majority of new products containing wheat, used durum wheat semolina which is estimated to account for 85% of the product launches, followed by durum wheat with 14.88% and hard red spring and hard red winter wheat only accounting for 0.12% of new launches.

Figure 1: New Products Containing Wheat, from January 2010 to October 2016

REGIONS

Within the review period, sixty countries in the world launched products containing wheat. The Europe region launched the most products with a total 15,502, followed by Asia Pacific (2,047), and Latin America (1,966). The countries launching the most products were in the European region such as France with a total of 2,541 products and Germany with 2,418 (*see figure 2*).

Figure 2: New Products Containing Wheat by Regions From January 2010 to October 2016

Region	Number of Products Launched	Top 3 Countries
Europe	15,502	France (2,541)
		Germany (2,418)
		Italy (2,068)
Asia Pacific	2,047	Japan (552)
		Australia (417)
		India (380)
Latin America	1,966	Mexico (597)
		Argentina (358)
		Brazil (356)
North America	1,891	United States (1,212)
		Canada (679)
Middle East & Africa	1,027	South Africa (449)
		Egypt (180)
		Saudi Arabia (132)
	Total	**22,433**

Source for both: Mintel, 2016.

PRODUCT CATEGORIES

Figure 3: Top New Product Launch Categories

The product categories to have the most product launches containing wheat were side dishes, meals and meal centers. All together accounting for 90% of new launches (*see figure 3*). Within the side dishes category, pasta saw the most product launches accounting for 55% of all new products launched. These were followed by prepared meals and stuffing, polena & other side dishes (*See figure 4*).

Figure 4: New Product Launched Categories and Sub-Categories, From January 2010 to October 2016

Category	Sub-Category	Number of Products
Side Dishes	Pasta	12,453
	Stuffing, Polenta & Other Side Dishes	753
	Noodles	187
	Rice	27
	Potato Products	18
Meals & Meal Centers	Prepared Meals	4,059
	Meal Kits	680
	Salads	649
	Instant Pasta	618
	Pizzas	400
	Instant Noodles	135
	Sandwiches/Wraps	83
	Pastry Dishes	36
	Instant Rice	4
Bakery	Bread & Bread Products	451
	Baking Ingredients & Mixes	107
	Savoury Biscuits/Crackers	55
	Cakes, Pastries & Sweet Goods	36
	Sweet Biscuits/Cookies	25
Soup	Dry Soup	413
	Wet Soup	261
Baby Food	Baby Savoury Meals & Dishes	334
	Baby Cereals	49
	Other Baby Food	39
	Baby Fruit Products, Desserts & Yogurts	16
	Baby Formula (6-12 months)	2
	Baby Formula (0-6 months)	1

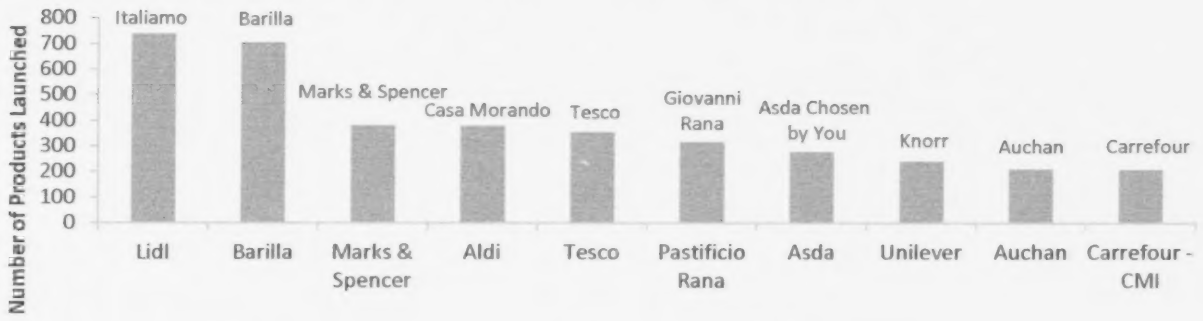
Source for both: Mintel, 2016.

During the same review period, the company to launch the most products was Lidl with a total of 740 launches mostly occurring within the last four years of the review period. Most of Lidl's product launches occurred in Germany, Switzerland, and France within the side dishes and meals & meal centers category.

The second largest company to launch wheat products was Barilla with a total of 705 products, all of which were launched in 2015 and 2016. Most of Barilla products were side dishes. The company launched its products in various countries around the world such as Italy, France, Mexico, and Greece.

The third largest company was Marks & Spencer with a total of 308 products, most of which was launched in European countries such as Ireland, the UK, and France. The company launched most of its products within the meals and meal centers category.

Figure 5: Top 10 Companies and Their Top Brands, from January 2010 to October 2016



Source: Mintel, 2016

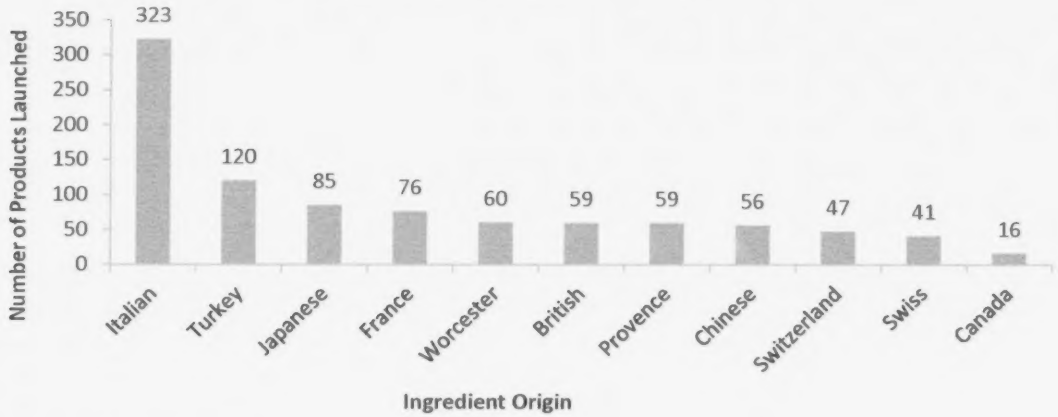
Figure 6: Top Countries and their Top 3 Companies to Launch New Products Containing Wheat, from January 2010 to October 2016

Country	Company	Sub-Category	Number of Products Launched
France	Carrefour - CMI	Pasta, Prepared Meals, and Meat Substitutes	603
	Lidl	Pasta, Prepared Meals, and Stuffing, Polenta & Other Side Dishes	
	Barilla	Pasta	
Germany	Lidl	Pasta, Meal Kits, and Prepared Meals	508
	Penny Markt	Pasta, Prepared Meals, and Instant Pasta	
	Aldi Süd	Pasta, Prepared Meals, and Meal kits	
UK	Asda	Prepared Meals, Pasta, and Salads	471
	Tesco	Prepared Meals, Pasta, and Fish Products	
	Marks & Spencer	Prepared Meals, Pasta, and Salads	
Italy	Coop. Pastai Gragnanesi	Pasta	408
	Coop	Pasta, Preapred Meals, and Pizzas	
	Coop Italia	Pasta, Prepared Meals, and Dry Soup	
Spain	Lidl	Pasta, Prepared Meals, and Meal kits	347
	Comercial Gallo	Pasta	
	Scamark	Prepared Meals, Instant Noodles, and Pasta	

INGREDIENT ORIGIN

During the review period, of the products that reported their ingredient origin, Italy, Turkey, and Japan were the top countries to provide wheat for product launches containing wheat types such as durum wheat, durum wheat semolina, hard red spring wheat and hard red winter wheat. Canada was the 16th largest supplier of wheat, specifically durum wheat and durum wheat semolina (*See figure 7*).

Figure 7: Top Ingredient Origins to Supply Wheat in New Product Launches, From January 2010 to October 2016



Source for both: Mintel, 2016.

Figure 8: Top 10 Ingredient Origin of Durum Wheat Semolina, From January 2010 to October 2016

Rank	Ingredient Origin	Durum Wheat Semolina
1	Italian	273
2	Turkey	85
3	France	67
4	British	55
5	Provence	53
6	Atlantic	46
7	Switzerland	38
8	Worcester	32
9	Japanese	31
10	Chinese	30
27	**Canada**	**13**

Figure 9: Top 10 Ingredient Origin of Durum Wheat, From January 2010 to October 2016

Rank	Ingredient Origin	Durum Wheat
1	Japanese	45
2	Italian	22
3	Worcester	20
4	Chinese	15
5	European Union	9
6	Alaska	9
7	Turkey	8
8	Australia	8
9	Manitoba	8
10	Wales	6
30	**Canada**	**2**

Source for both: Mintel, 2016.
Note: Ingredient origin was not available for all products launched. As a result, there is no data available for hard red spring wheat and hard red winter wheat.

PRODUCT CLAIMS

The top claims of product launches containing wheat were convenience, natural, and ethical and environmental.

Figure 10: Top Claims from Products Launches Containing Wheat, From January 2010 to October 2016

Source: Mintel, 2016.

Figure 11: Top Claims by Top 5 Countries from Product Launches Containing Wheat, From January 2010 to October 2016

Country	Claim	Number of Products
France	Microwaveable	809
	Ethical - Environmentally Friendly Package	721
	No Additives/Preservatives	481
	Organic	399
Germany	No Additives/Preservatives	581
	Microwaveable	529
	Organic	495
	Ease of Use	337
Italy	No Additives/Preservatives	209
	Microwaveable	196
	Time/Speed	183
	Organic	158
UK	Ethical - Environmentally Friendly Package	919
	Vegetarian	914
	No Additives/Preservatives	750
	Microwaveable	723
	Low/No/Reduced Transfat	334
Spain	Microwaveable	258
	No Additives/Preservatives	177
	Time/Speed	147
	Organic	127

Source for both: Mintel, 2016.

MARKETS OF INTEREST

Italy

During the review period, Italy launched 2,068 products containing wheat as an ingredient. However, within the last few years, the use of wheat declined with most launches occurring in 2013. Of the total product launched, 71.4% were new products while 28.6% were re-launches. The majority of product launches contained durum wheat semolina and the remainder contained durum wheat. Most of the wheat used originated from Italy, Turkey, and India. Lastly, the top companies to launch these products were Barilla, Lidl, and Pastificio Rana.

Japan

In Japan, there was 552 product launches most of which occurred in 2015. Of the products launched 64% were new products while the rest were re-launches. Most of the products launched used durum wheat while the remainder of products used durum wheat semolina. The main origin for wheat came from Japan, Worcester (England), and China. Lastly, the companies to launch products containing wheat in Japan were Nisshin Foods, Nippon Flour Mills, and Aeon.

Indonesia

In Indonesia, there were 56 products launched with growth occurring within the last four years of the review period. Half of the products launched were new products while the other half were re-launched products. In addition, most of the wheat ingredients used were durum wheat semolina. Lastly, the companies to launch the most products were Indofood Sukses Makmur, Egafood, and Muria Food.

South Korea

There were 34 product launches in South Korea, products containing wheat increased in the last few years of the evaluation period and most of the launches occurred in 2016. Like other markets durum wheat semolina accounted for most of the wheat launches followed by durum wheat. All of the wheat ingredients used in these product launches originated from Italy. Lastly, LU Korea, Daesang, and De Matteis Agroalimentare were the top companies to launch wheat prdocuts in South Korea.

China

In China, there were 22 product launches, with 68.2% of them occurring in 2015. Most of the products were entirely new to the Chinese market with only 27% accounting for re-launches. Durum wheat semolina accounted for over 90% of the product launches. Lastly, the top companies to launch these products in China were Barilla, Carrefour, and Food Vending China.

PRODUCT EXAMPLES

Organic Penne Pasta

Record ID:	4385887
Company:	Pastificio Attilio Mastromauro Granoro
Distributor:	Eko-Wital
Brand:	Granoro Il Primo Bio
Category:	Side Dishes
Sub-Category:	Pasta
Country:	Poland
Country of Manufacture:	Italy
Import Status:	Imported product
Store Name:	Carrefour
Store Type:	Mass Merchandise/Hypermarket
Store Address:	Kraków 31-154
Date Published:	Oct 2016
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in local currency:	PLN15.49
Price in US Dollars:	$ 3.90
Bar Code:	8007290133434

Product Description

Granoro Il Primo Bio Makaron Pennoni Rigati Bio (Organic Penne Pasta) is a 100% organic Italian product. This durum wheat pasta cooks in eight minutes and retails in a 500g pack featuring the EU Green Leaf, USDA Organic and ICEA logos.

Oriental Tabbouleh

Record ID:	4312631
Company:	Leader Price - DLP
Brand:	Leader Price Bio
Category:	Side Dishes
Sub-Category:	Stuffing, Polenta & Other Side Dishes
Country:	France
Store Name:	Leader Price
Store Type:	Supermarket
Store Address:	Givors 69700
Date Published:	Sep 2016
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in US Dollars:	$ 1.23
Bar Code:	3263859498016

Product Description

Leader Price Bio Taboulé Oriental (Oriental Tabbouleh) comprises vegetables and durum wheat semolina from organic farming. The Ecocert certified product retails in a 180g pack featuring the AB and EU Green Leaf logos.

Sweet Milk Rice Lasagne

Record ID:	4202793
Company:	Prima Menü
Brand:	Prima Menü
Category:	Desserts & Ice Cream
Sub-Category:	Other Frozen Desserts
Country:	Germany
Country of Manufacture:	Germany
Import Status:	Not imported
Store Name:	Netto Marken-Discount
Store Type:	Supermarket
Store Address:	Stuttgart 70174
Date Published:	Aug 2016
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in US Dollars:	$ 1.63
Bar Code:	4023372702408

Product Description

Prima Menü Süsse Lasagne (Sweet Milk Rice Lasagne) is now available. The pasta sheet with milk rice and sour cherry sauce in layers sprinkled with breadcrumbs is deep frozen and can be eaten warm or cold after thawing. The product can be microwaved, is CO2 neutral, produced with green energy and retails in a 450g pack featuring the Facebook logo, a QR code and the FSC logo.

Tomato and Pasta Energy Compote

Record ID:	4051189
Company:	Diété Sport
Brand:	Overstim.S Salty Mix
Category:	Other Beverages
Sub-Category:	Meal Replacements & Other Drinks
Country:	France
Country of Manufacture:	France
Import Status:	Not imported
Store Name:	Overstim.s
Store Type:	Internet/Mail Order
Date Published:	Jun 2016
Product source:	Shopper
Launch Type:	New Product
Price in US Dollars:	$ 12.77
Bar Code:	3700153171509

Product Description

Overstim.S Salty Mix Aliment de l'Effort Tomate-Pâtes (Tomato and Pasta Energy Compote) is now available. The product is a savoury and digestible energy snack, a source of calcium to contribute to the functioning of the digestive enzymes. This energy snack contains magnesium and calcium, provides carbohydrates, and retails in pack containing 3 x 90g pouches.

Whole Wheat Flour

Record ID:	1622379
Company:	Wheat Montana Farms & Bakery
Brand:	Wheat Montana Farms & Bakery Bronze Chief
Category:	Bakery
Sub-Category:	Baking Ingredients & Mixes
Country:	USA
Store Name:	Walmart
Store Type:	Mass Merchandise/Hypermarket
Store Address:	Sikeston 63801
Date Published:	Sep 2011
Product source:	Shopper
Launch Type:	New Product
Price in local currency:	$ 3.76
Bar Code:	725963004109

Product Description

Wheat Montana Farms & Bakery Bronze Chief Whole Wheat Flour is a premium 100% wholegrain wheat flour which is free from chemicals and GMOs. This product is unbleached, high in protein, made from hard red spring wheat, and has a 100% nutritional value with nothing added or removed. The all natural product is sourced from sustainable farming and retails in a 5lbs pack.

Dry Food for Beautiful Adult Neutered Cats

Record ID:	4255975
Company:	Nova Foods
Brand:	Nova Foods Elegance Super Premium
Category:	Pet Food
Sub-Category:	Cat Food Dry
Country:	France
Store Name:	Carrefour
Store Type:	Mass Merchandise/Hypermarket
Store Address:	Pontault Combault 77340
Date Published:	Sep 2016
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in US Dollars:	$ 6.39
Bar Code:	8059149032221

Product Description

Nova Foods Elegance Super Premium Beautiful Aliment Complet pour Chat Adulte Stérilisés (Dry Food for Beautiful Adult Neutered Cats) is now available. The product is made with rice and fresh chicken to satisfy difficult palates, and offer better digestibility and protein absorption. It has been specially designed to promote the beauty of the cat, is said to provide high natural nutrition, and is free from added colourants, preservatives and artificial flavouring. The product contains the following nutrients: spirulina algae, beer yeast and zinc to aid the beauty of the cat's coat, omega 3 and 6 to promote the well-being and elasticity of the skin; pea fibres to promote the intestinal transit and expulsion of fur balls. It features a formula specially developed to maintain muscular weight and urinary functions, which are sensitive in neutered cats. It is suitable for cats from one year of age and retails in a 400g easy open pack featuring the Facebook and Pets' Friends No Animal Testing logo.

Peanut Butter Flavor Mini Bones

Record ID:	1923000
Company:	Rolf C. Hagen
Brand:	Pur-Luv
Category:	Pet Food
Sub-Category:	Dog Snacks & Treats
Country:	Canada
Store Name:	Petsmart
Store Type:	Specialist Retailer
Store Address:	Edmonton T6T 0B9
Date Published:	Nov 2012
Product source:	Shopper
Launch Type:	New Product
Price in US Dollars:	$ 3.97
Bar Code:	073091824398

Product Description
Pur-Luv Peanut Butter Flavor Mini Bones are suitable for small dogs and are made with peanuts, flax seed and honey. They are low in fat, long-lasting and contain omega fatty acids. Peanuts are a source of monounsaturated fat and protein while flax seed is a good source of omega fatty acids. This product retails in a resealable 170g pouch. Also available is a Bacon Flavor variety.

Source: Mintel, 2016.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

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RESOURCES

Mintel Global New Products Database, 2016.

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NEW PRODUCTS CONTAINING WHEAT
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